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"STONEWALL" JACKSON'S SHENANDOAH VALLEY
CAMPAIGN: A STUDY OF THE PRINCIPLES OF WAR

MAJOR WALTER E. NEUHAUSER, JR.   84-1860

── *"insights into tomorrow"* ──

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"Stonewall" Jackson's Shenandoah Valley Campaign of 1862 is described. The campaign is then analyzed using the principles of war defined by AFM 1-1 as a framework for analysis. Examples of effective and ineffective application of the principles of war by Union and Confederate commanders are given.

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PREFACE

This paper describes the Shenandoah Valley Campaign of 1862, commonly referred to as Jackson's Valley Campaign. The campaign is of continued interest today because it is a classic example of how a numerically inferior force can achieve victory over a superior force through more effective application of the principles of war.

Following the campaign description, each of the principles of war defined by Air Force Manual 1-1 is presented with examples of effective and ineffective application by the Union and Confederate commanders. This study of the application of the principles of war in actual practice is essential if the military professional is to fully understand their significance.

One of the lessons of history is that many of the problems we face today are not unique to our time. Two examples make this clear. There has been much discussion among Air Command and Staff College course officers concerning the direct control of ongoing military operations by the civilian command authorities. This is not a new issue. During the Valley Campaign, President Lincoln and his Secretary of War assumed responsibility for coordinating the day-to-day actions of the four Union armies involved. Lincoln's failure to delegate this task to a single military commander contributed to the Union defeat. A second example is provided by the 1983 Grenada invasion, when there was widespread discussion on the rights of the news media. During this debate, the author read a heated editorial protesting the government's control of news on military operations and the delay in releasing information to the press. The editorial was dated 1862.

The study of history might not provide the answers to today's problems, but it is one of the essential ingredients in developing the wisdom necessary to solve them.

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ABOUT THE AUTHOR

Major Walter E Neuhauser, Jr earned a Bachelor of Mechanical Engineering degree from the University of Virginia in 1968. In 1977 he was awarded the degree of Master of Science in Mechanical Engineering by the University of Southern California. He is also a distinguished graduate of Squadron Officer School.

Commissioned through the four year Air Force Reserve Officer Training Corps in 1968, Major Neuhauser entered active duty in 1970 as an Electronic Data Processing Officer assigned to the Minuteman Program Office located at Norton AFB, California. In 1972, he was reassigned to the Minuteman Site Alteration Task Force at Ellsworth AFB, South Dakota. There he served as a Facilities Engineer, responsible for managing contractor modifications to Minuteman launch sites during a major upgrade program. Following this tour, Major Neuhauser was assigned to the Advanced Ballistic Reentry Systems Program Office at Los Angeles Air Force Station, California. As Deployment Systems Project Manager, he directed the procurement and test of Minuteman I deployment systems in support of Army ballistic missile defense system testing and advanced reentry system technology flight tests. In 1977, he was assigned to the 6555 Aerospace Test Group, located at Cape Canaveral Air Force Station, Florida. There he served in various positions, including Titan IIIC Launch Controller, Chief of Launch Vehicle Engineering, Chief of Launch Control, and Chief of Inertial Upper Stage Operations. In 1983, the Indian River Chapter of the Florida Engineering Society named him as Engineer of the Year. Following this assignment, he attended Air Command and Staff College in residence.

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Union

BANKS,   Nathaniel P., Maj Gen; Commanded the Union army in the Shenandoah Valley. Union commander at the battle of Winchester.

FREMONT, John C., Maj Gen; Commanded the Union Mountain Department in the Allegheny Mountains. The Union commander at the battle of Cross Keys. Also known for his western exploration.

KING,   R., Brig Gen; One of McDowell's division commanders. Ordered to the Valley following the battle of Winchester, he was halted before crossing the Blue Ridge.

McCLELLAN George B., Maj Gen; Commanding General of the Union armies until relieved by Lincoln in March 1862. Commanded the Union Peninsula Offensive against Richmond.

McDOWELL, Irvin, Brig Gen; One of McClellan's corps commanders until Lincoln detached his corps and made it an independent army after the battle of Kernstown. Jackson's activities in the Valley prevented McDowell's army from ever joining McClellan at Richmond.

MILROY,   Robert. H., Brig Gen; One of Fremont's brigade commanders. Union commander at the battle of McDowell.

ORD,   E. O. C., Maj Gen; One of McDowell's division commanders. His division was ordered to the Valley following the battle of Winchester, but halted at Front Royal and did not see action.

SHIELDS, James, Brig Gen; Initially, one of Banks' division commanders. Union commander at the battle of Kernstown. Transferred to McDowell's command following the battle of Kernstown. Returned to the Valley after the battle of Winchester.

TYLER,   E. B., Col; One of Shields' brigade commanders. Union commanding officer at the battle of Port Republic.

WILLIAMS, Alpheus S., Brig Gen; One of Banks division commanders.

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Confederacy

ASHBY,   Turner, Col; Jackson's cavalry commander. Promoted to Brig Gen
             two weeks before his death on 6 Jun 1862.

EWELL,   Richard S., Maj Gen; One of Johnston's division commanders.
             Became one of Jackson's division commanders after his division
             joined Jackson in the Shenandoah Valley.

JACKSON,   Thomas J., Maj Gen; Commander of the Confederate Shenandoah
             Valley District and senior Confederate officer in the Valley.

JOHNSON,   Edward, Brig Gen; Commanded the Confederate army in the Alleghenv
             Mountains west of Staunton. His army was incorporated into
             Jackson's after the battle of McDowell. Wounded at McDowell and
             played no further role in the Valley Campaign.

JOHNSTON,   Joseph, E., Gen; Commanding general, Confederate Army of the
             Potomac. Jackson's immediate superior. In charge of the defense
             of Richmond during the Peninsula Campaign.

STEUART,   George H., Brig Gen; One of Ewell's brigade commanders.
             Commanded Ewell's cavalry during the Valley Campaign.

TAYLOR,   Richard, Brig Gen; One of Ewell's brigade commanders. Commanded
             the Louisiana Brigade.

WINDER,   Charles S., Brig Gen; One of Jackson's brigade commanders.
             Commanded Jackson's old "Stonewall" Brigade.

Chapter One

INTRODUCTION

In today's accelerating quest for high technology weapons, it is easy to lose sight of the importance of lessons from previous wars. One of these lessons is that the basic concepts for the successful employment of armed forces change little through the years. The Air Force has codified these concepts in AFM 1-1 as the principles of war. These principles do not provide a rigid structure for the employment of forces, nor do they guarantee success. However, the commander who understands these principles and who develops his strategy in accordance with these principles greatly enhances his chance of success. It is, therefore, important for today's military professional to study the battles of the past and to understand how application of these principles of war relate to victory or defeat.

PURPOSE

This paper is written as a course officer reading for the warfare studies phase of the Air Command and Staff College curriculum. It will describe "Stonewall" Jackson's Shenandoah Valley Campaign and then analyze the campaign in light of the principles of war as defined by AFM 1-1. The paper consists of three major sections, each of which is designed to stand alone. The first section, Chapter Two, describes the campaign, with emphasis on strategic movement and the relationship to events outside of the Shenandoah Valley. The second section, Chapter Three, is a campaign analysis which presents the

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principles of war as defined in AFM 1-1, and then discusses how well each side

applied these principles and the resulting impact on the campaign. The final

section consists of guided discussion questions and is located in Appendix B.

THE VALLEY CAMPAIGN

Lt Gen Thomas J. "Stonewall" Jackson's Shenandoah Valley Campaign of 1862

provides an excellent study in the application of the principles of war. This

campaign is considered a strategic masterpiece by many military historians.

It can even be argued that this campaign was all that prevented the defeat of

the Confederacy in 1862. During the entire six month campaign, Jackson was

opposed by Union forces that not only greatly outnumbered his, but which were

also better equipped and armed. His great success is directly attributable to

the degree to which he more effectively incorporated the principles of war in

his strategy than did the Union commanders.

BACKGROUND

The Confederacy was in serious trouble in the spring of 1862. The

optimism and high spirits which followed the first battle of Manassas had

given way to gloom as the reality of war set in (13:89). In mid-February

Union forces captured Forts Henry and Donelson on the Tennessee and Cumberland

rivers, forcing the evacuation of Nashville (9:76). Also in February, Union

forces occupied Roanoke Island on the North Carolina coast. This led to the

capture of the vital ports of New Bern in March and Beaufort Harbor in April

(9:112). In March, Maj Gen McClellan began embarking his army of 155,000

troops for Fort Monroe in Virginia to begin his Peninsula Campaign against

Richmond (6:Map 39). On 7 April the Confederacy was defeated at Shiloh in the

bloodiest battle of the young war (6:Map 38). Finally, New Orleans fell to

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the Union in April and the Confederates were forced to abandon Norfolk in May (13:88; 9:178).

In addition to these defeats, the entire defense of the Confederacy was threatened by a lack of troops. Original enlistments in 1861 were approved for only one year for regular troops, and six months for militia. By the winter of 1861 enthusiasm for the war was declining and enlistments were low. An attempt to boost enlistments by granting liberal furloughs, allowing transfers between service branches, and allowing reenlisting units to elect new officers caused chaos in the army (9:2). When a conscription act was finally passed by the Confederate congress in March 1862, it was estimated that the enlistments of 148 regiments would expire within 30 days (9:114).

In the North, the mood was just the opposite. The despair following the defeat at Manassas had changed to hope. The victories of the spring renewed expectations of a short war. The Navy was making significant contributions, most notably in the victory at New Orleans and the tightening blockade of the Confederacy (13:88). McClellan had finally begun his campaign against Richmond, and its fall and the fall of the Confederacy was viewed as only a matter of time. Optimism had reached the point that in May Secretary of War Stanton issued an order to stop recruiting troops (13:105).

It was against this backdrop that Jackson conducted his valley campaign. At its conclusion in June 1862 he had given the Confederacy a much needed victory, a new life, and a new hero (15:234).

THE SHENANDOAH VALLEY

Nestled in the mountain ranges of western Virginia lies the Shenandoah Valley. Running southwest from the Potomac River, it is bordered on the east by the Blue Ridge Mountains and on the west by the Allegheny Mountains. A

dominant feature of the Valley, and one which was a significant factor in the Valley Campaign, is Massanutten Mountain. This mountain range lies midway between Winchester and Staunton and runs parallel to the Blue Ridge for fifty miles. The Valley proper lies to the west of this range while the Luray Valley lies to the east. Midway along the Massanutten, the Massanutten Gap runs east-to-west connecting the main Valley and the Luray Valley (15:114).

The Shenandoah Valley, broad, flat and fertile, was a major source of grain and livestock for the Confederacy. It was also one of the more highly industrialized areas of the south. Key cities were Winchester to the north, and Harrisonburg and Staunton to the south. Extending east from Staunton, the Virginia Central Railroad connected the Valley with Richmond. The Valley Turnpike, an excellent all weather road, connected Winchester and Staunton (15:1-28).

The Valley also had strategic significance. It provided ready invasion routes for both the Union and Confederacy. At its northern end, the Valley lay thirty miles behind Washington, and provided easy access to Pennsylvania. Lee used this route for both of his Northern invasions. To the South, the Valley cut across the rail lines connecting Richmond and its western armies. In central Virginia, numerous passes opened through the Blue Ridge Mountains into the rear of the Confederate defense (15:40).

When discussing directions in the Valley, a unique terminology prevails. The Upper Valley is to the south, and the lower Valley is to the north. Thus, to go up the Valley is to go south. This is the terminology that will be used in this paper.

Chapter Two

CAMPAIGN DESCRIPTION

"Stonewall" Jackson's Shenandoah Valley Campaign of 1862 is widely regarded as a strategic masterpiece. Although outnumbered at least two to one, and at times by five to one, he waged a vigorous offensive campaign against three separate Union armies (15:323). While he achieved only a stalemate in the valley, his campaign contributed greatly to Confederate success on other fronts. Not only did his victories boost Southern morale, his success also diverted a large number of reinforcements intended for McClellan during the Union campaign against Richmond. Robert Tanner notes in his book on the Valley Campaign:

> The Campaign...brings into focus the reasoned application of principles of war too often dismissed as incidental to the "instinctive brilliance" and "strategic genius" of a commander. The Campaign ultimately is an illustration that strategic brilliance springs from hard work and common sense in the application of the fundamental principles of war (15:xvii,xviii).

This chapter describes the Valley Campaign, with primary emphasis on the period beginning with the Union occupation of Winchester in March 1862 and concluding with Jackson's departure from the Valley on 17 June 1862. Attention will be focused on the strategic movements within the Valley, with little discussion of the detailed movements during individual battles.

BACKGROUND

In late October 1861, Union forces captured Romney, West Virginia (10:38).

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The alarmed citizens of Winchester wrote the Confederate government asking that an experienced military officer be sent to take charge of operations in the area (15:38). Jackson, then with the army at Centreville, was selected for this task. He arrived in Winchester on 4 November 1861 to assume command of the newly created Valley District (22:389).

Jackson's initial task was to build an army. By January, he had assembled approximately 10,000 men and had successfully retaken Romney. However, the Secretary of War soon directed him to withdraw his forces to Winchester due to concern over their exposed location. He devoted the remainder of the winter to attacks on the Baltimore and Ohio Railroad and the Chesapeake and Ohio Canal along the Potomac River (15:29-93; 6:Map 48).

SITUATION ON 1 MARCH 1862

By the first of March, Jackson's command in Winchester had shrunk to 4600 men (8:114). Supporting Confederate forces included Brig Gen Johnson's army of 3000 men opposing Maj Gen Rosecrans near McDowell, Virginia and the main body of the Confederate Army of the Potomac at Centreville, commanded by Gen Johnston (6:Map 39).

On the Union side, Maj Gen Banks had just crossed the Potomac at Harper's Ferry with 27,000 men. Brig Gen Shields had another 12,000 troops in the mountains 30 miles northwest of Winchester (8:113). Maj Gen Rosecrans (who was replaced by Maj Gen Fremont at the end of March) had 4500 men scattered in the Alleghenies from McDowell to Romney. Finally, Maj Gen McClellan's 155,000 man Union Army of the Potomac was in the Washington D.C. area (6:Map 39).

McClellan was planning the Peninsula Campaign to capture Richmond and end the war. He intended to move his army by ship to Fort Monroe, Virginia and then approach Richmond via the peninsula between the York and James Rivers.

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Figure 1. The Shenandoah Valley Campaign, May 1862 (14:96)

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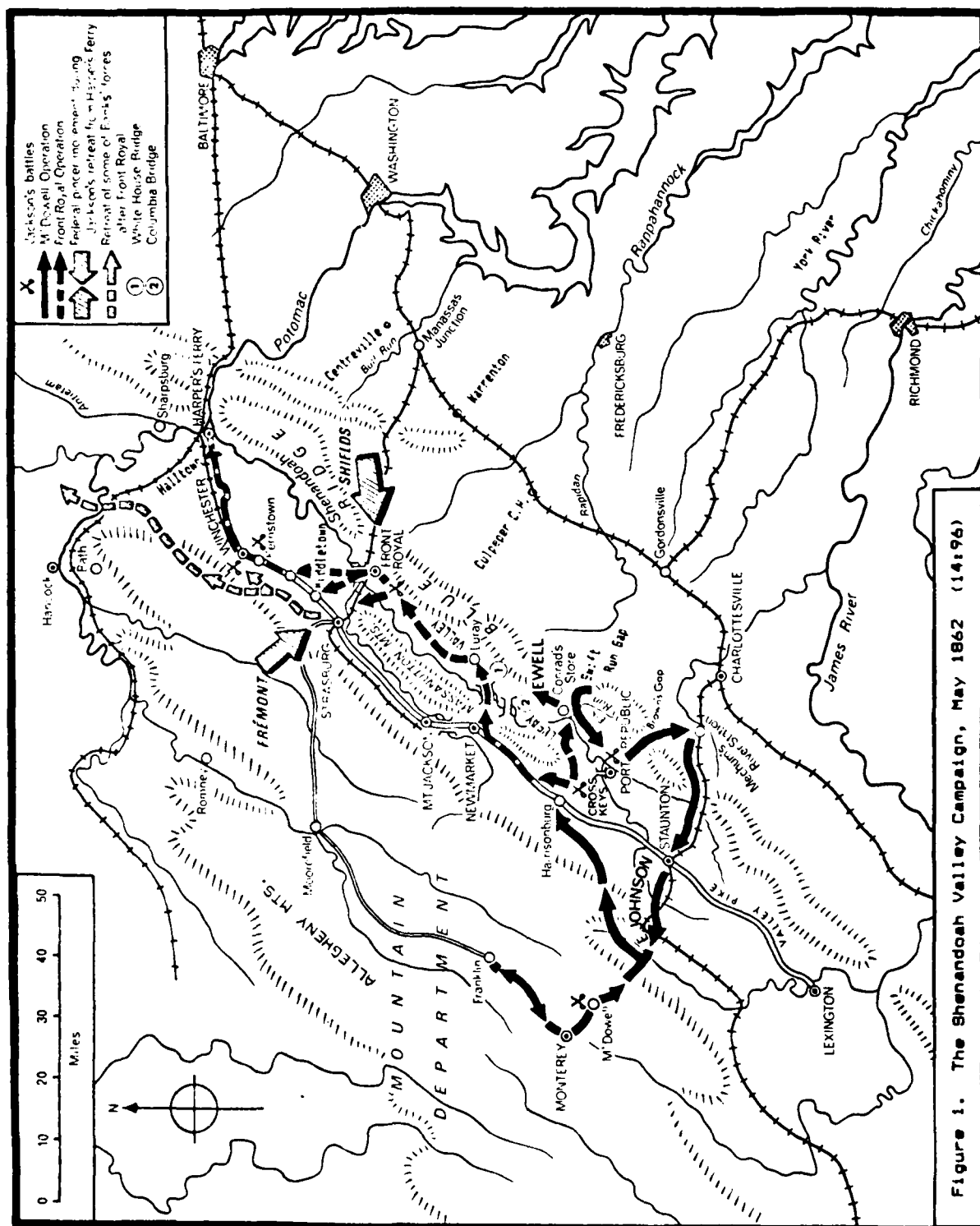
To satisfy Lincoln's concern for the safety of Washington, McClellan agreed to leave a force of 25,000 troops at Manassas Junction. This agreement provided the lever which enabled Jackson's actions in the Valley to influence the outcome of McClellan's Campaign. McClellan was also directed to secure the Baltimore and Ohio Railroad and the Chesapeake and Ohio Canal before his campaign began. To do this, Banks was ordered to push Jackson out of Winchester and post a small garrison to prevent Jackson's return. Banks' army was then to move to Manassas Junction to protect Washington (11:192-196,240; 15:100-102).

THE UNION ADVANCE ON WINCHESTER

Banks' army crossed the Potomac at Harper's Ferry on 24 February. By 7 March, he encountered Confederate pickets north of Winchester and halted (15:102,106). Jackson began preparing to abandon Winchester, and on 6 March he ordered removal of stores to Mount Jackson (15:104). On the 10th, Banks resumed his advance toward Winchester (8:3). Shields, who had also moved toward Winchester, joined Banks on the 11th (15:104-107). That same day, Jackson ordered the army to evacuate and on the 12th, the last Confederate soldier left Winchester without a fight (15:108). The following day, Banks was ordered to immediately send one of his three divisions back to Harper's Ferry and to send Williams' Division to Manassas Junction (22:748).

As part of the overall strategy of McClellan's Peninsula Campaign, Banks was ordered to move up the Valley, drive Jackson out, and then retire to a position nearer Washington. However, Banks did not energetically pursue Jackson, and did not reach Strasburg until the 19th. Jackson, meanwhile, had retired to Mount Jackson (22:59). His instructions from Johnston were to avoid battle but to stay close enough to Banks to keep him in the Valley (1:38).

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Beyond the Valley, events were occurring which would have an impact on the campaign. In Washington, Lincoln removed McClellan as commanding general of the Union armies, leaving McClellan free to concentrate on the Peninsula Campaign. Instead of replacing him, Lincoln assumed overall direction of the Union armies for the next four months. Coordination between Banks, Fremont, and McClellan was to be done by Lincoln and Secretary of War Stanton. On 17 March, the first of McClellan's troops embarked for Fort Monroe to begin the long awaited Peninsula Campaign (6:Map 39; 11:225).

Williams' Division left Strasburg for Manassas on 20 March, leaving Shields to watch Jackson (22:59). The same day, Shields fell back from Strasburg to Kernstown. He reported that this action was designed to lure Jackson into battle (20:235). At Kernstown, Shields carefully hid his troops and showed only a single brigade in response to reconnaissance by the Confederate cavalry under Col Ashby. As a result, Ashby reported that only 2000 Union troops remained in Winchester. When Jackson learned of Shields' withdrawal, he immediately followed him to Kernstown (8:128).

The battle of Kernstown took place on 23 March. Ashby and advance units of the Stonewall Brigade began pressing Shields during the morning, but were forced back. In mid-afternoon, Jackson's main body arrived. Jackson had originally planned to attack on the following day. However, after observing that the Union position gave Shields full view of his troops, Jackson decided to attack immediately. He sent Ashby to occupy the center of the Union line and, after some confusion, launched his main attack on the Union right. This attack encountered unexpectedly heavy resistance. Jackson soon learned that his army of just over 3000 was opposed not by 2000 men, but by Shields' full division of 9000 (6:Map 49). After a fierce fight, the Stonewall Brigade, located in the center of the Confederate line , ran short of ammunition and

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fell back. This exposed the flank of the adjacent division and the Confederate line collapsed. Only a fierce rear guard action and the failure of Shields to vigorously pursue his advantage saved Jackson from disaster (15:118-126; 16:51).

Kernstown was a tactical loss for the Confederacy, but a strategic victory. Jackson's army had attacked so fiercely that Shields overestimated its strength and immediately recalled Williams' Division to the Valley (15:126-127). With Banks command tied up in the Valley, Lincoln ordered one of McClellan's corps, under Brig Gen McDowell, to remain at Manassas. Thus the Southern strategy of detaining Banks in the Valley was not only working, but had also kept McDowell's command of 30,000 from McClellan (11:261,277).

Following Kernstown, Jackson again retreated to Mount Jackson. Banks, who had returned to the Valley, followed him closely only as far as Strasburg. On 1 April, Banks received new instructions. He was to drive Jackson well back up the Valley, and then take up a position to prevent his return (8:133). In response, Banks moved forward to Harrisonburg which he reached on the 24th (10:50-51). Jackson was too weak to oppose this advance and on the 19th he retreated to Conrad's Store at the western end of Swift Run Gap (6:Map 50).

While Jackson was retreating to Conrad's Store, several important events occurred outside of the Valley. Gen Johnston moved his army to Richmond to oppose McClellan, leaving Maj Gen Ewell with 8000 men at Culpeper to watch McDowell's army now located at Warrenton (10:51). On the 17th, McDowell began his advance on Richmond by moving from Warrenton to the Rappahannock River opposite Fredericksburg, where he again halted (19:275). In the west, Fremont began moving toward Staunton in preparation for an advance on Knoxville by way the Valley (15:154).

JACKSON GOES ON THE OFFENSIVE

Jackson now had to decide on his next move. Johnston's instructions had been to press Banks but avoid battle and remain ready to move immediately to Richmond. As Johnston became preoccupied with McClellan, Jackson began receiving communications from Gen Lee, who was military advisor to President Davis, but who was not in Jackson's chain of command. Lee was greatly concerned with stopping McDowell's advance toward Richmond. He suggested that Jackson might join Ewell and attack Banks in order to threaten McDowell's flank. If this was not possible, he suggested that Jackson and Ewell move east of the Blue Ridge and threaten McDowell's army directly (5:151,155-156). Whichever course he chose, Jackson knew he had to act soon. Banks was reporting that Jackson had left the Valley, and Jackson feared that Banks would again be sent east (15:160; 19:275). On 4 May Banks received the orders Jackson feared. Shields' Division was to be sent immediately to join McDowell while Williams' Division was to fall back and fortify Strasburg (8:167). Jackson, however, had already set his troops in motion.

Jackson ordered Ewell to join him at Conrad's Store, but when Ewell's army marched into Jackson's camp on 30 April they found it empty. Early that morning, Jackson had marched toward Harrisonburg and then turned toward Port Republic. On 3 May his army passed out of the Valley via Brown's Gap, only to board trains at Mechum's River Station bound for Staunton, arriving there completely unannounced on the 4th. On the 5th, Banks withdrew from Harrisonburg to New Market in response to his new instructions. This provided the opening Jackson needed. On the 7th he joined Johnson and advanced on Fremont's southernmost unit located in the town of McDowell. The army reached McDowell the following day and found the Union army waiting. Brig Gen Milroy, the Union commander, had learned of Jackson's approach on the 7th and had

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summoned reinforcements (15:162-171). Even with these reinforcements Milroy was able to field only 3000 men compared to Jackson's 6000. Although he was outnumbered, Milroy attacked while the Confederates under Johnson were still moving into position. The Union achieved initial success, and it was only after Johnson fell wounded and Jackson threw in fresh troops that Milroy was forced to retreat. That night the Union army burned its camp and withdrew toward Franklin. The Confederates spent the 9th regrouping around McDowell and did not reach Franklin until the 11th. Jackson knew that Union reinforcements were approaching and he was concerned by his long absence from the Valley, so he left Franklin on the 12th. He retraced his route through McDowell and reached the western edge of the Valley on the 15th (15:169-178; 8:178-180).

The battle of McDowell, although small, had several important consequences. First, it forced Fremont north, relieving Union pressure on Staunton and preventing Fremont and Banks from joining forces in the upper Valley. Second, Jackson was able to incorporate Johnson's army into his own. And third, it provided a much needed Southern victory (15:177)

Meanwhile, Banks continued redeploying in response to his orders from Lincoln. He had learned of Ewell's arrival at Conrad's Store and the direction of Jackson's march by 2 May. However, after that he lost touch with Jackson for nearly three weeks. On the 12th, the same day Jackson left Franklin, Shields' Division started through Massanutten Gap on it's way to join McDowell and the following day Williams' Division reached Strasburg (15:177-178).

On the 18th Jackson and Ewell met to discuss strategy. They soon realized that the Union movements had left Banks isolated in the Valley and decided to attack him. Speed was all important. Shields had nearly reached

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Fredericksburg and McDowell's offensive was about to begin. Jackson pushed his army north to New Market and through the Massanutten Gap to Luray, where he joined Ewell's army on the 21st. Their combined army now numbered 17,000 men and 50 guns (15:202-207).

In Strasburg, meanwhile, Banks had only partially fortified the city. The departure of Shields had greatly reduced his command, and there were now only 4500 infantry, and 1800 cavalry in the city. An additional 1000 men were posted in Front Royal to guard the railway bridges. Banks still had not located Jackson, but believed that he was in Harrisonburg and that Ewell was still at Conrad's Store (15:206).

In the east the Confederate position was deteriorating. Johnston was retreating in front of McClellan, who had advanced to within eight miles of Richmond on the 22nd. In addition, Shields joined McDowell on the 22nd. McDowell reported to McClellan that he had "...received the orders of the President to move with the army under my command and cooperate with yours in the reduction of Richmond...." (15:207). Lincoln himself was going to Fredericksburg the next day to review McDowell's army of 40,000 men and 100 guns as it started for Richmond. (15:206-208)

On 23 May, Jackson attacked Front Royal. His cavalry units overran Union outposts between Strasburg and Front Royal and severed communications. Then, his army entered Front Royal by a little used back road and completely surprised the defenders. The Union troops were forced out of the town and the Confederates captured the river bridges intact. The Union force attempted another stand on the road to Winchester, but a cavalry charge broke their line and they surrendered. Both Jackson and Banks now faced the critical decision of what to do next (15:209-215).

Jackson had to consider four possible responses by Banks. Banks could stay in Strasburg, he could retreat west and join Fremont, he could retreat to Winchester, or he could wait until Jackson moved toward Winchester and then escape to the east through Front Royal. The last option caused Jackson the most concern. Because Jackson's prime objective was to prevent Banks from joining McDowell, he had to balance that objective against his desire to catch Banks on the move. He chose to buy time until Banks intentions could be determined. Jackson started his army north along the Front Royal-Winchester road on the morning of the 24th, but halted it at mid-morning until he could learn Banks' location (7:383-386; 15:218-220).

Banks, meanwhile, had to decide how to respond to the attack at Front Royal. He did not receive reports of the attack at Front Royal until the evening of the 23rd. He then interpreted this attack as a cavalry raid, since he still believed that Jackson was somewhere in the vicinity of Harrisonburg. He refused to consider a retreat on the night of the 23rd, although urged to do so by some of his commanders, preferring to remain in Strasburg until he had "developed the force of the enemy" (8:192). By the morning of the 24th, Banks still expected the attack to come from the south. Demonstrations by the Confederate cavalry had convinced him that at least a division was in that direction. It was not until mid-morning that he began moving his supplies and wagons to Winchester. Shortly thereafter he realized that Jackson's entire army was on his flank and ordered an immediate retreat to Winchester (15:207-217; 8:190-199).

By 1100 Jackson knew that Banks' wagons were on the road to Winchester. Now that he knew Banks' destination, he acted rapidly. Leaving Ewell's Division as a reserve, Jackson marched the remainder of the army east to Middleburg, located on the Valley turnpike. At approximately 1530, Jackson's

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lead elements reached Middleburg and found the Union wagon train fleeing north. The Confederates soon came under artillery fire from the south. Jackson interpreted this as an attack by Banks' main body. He summoned two of Ewell's brigades and began forming for battle. After a short skirmish, the Union force retreated to the west, revealing that they were only a rear guard. Jackson then turned his army toward Winchester. Earlier, he had sent Ashby's cavalry and an artillery company to pursue the retreating Union force toward Winchester. Ashby's poorly disciplined cavalry soon disintegrated as they looted the Union wagons, forcing the artillery to stop also. This respite enabled the Union army to reform an effective rear guard and greatly slow the Confederate pursuit. Jackson feared that the Union army, if given time, would occupy the high ground around Winchester. He continued to push his army north throughout the night, fighting a series of engagements with the Union rear guard. Finally his exhausted troops could go on no longer, and he called a halt about 0300 (15:220-225).

At dawn, Jackson resumed his advance. Just south of Winchester, he directed the Stonewall Brigade onto a hill to the west of the turnpike, only to find the Union army arrayed on a series of opposing hills. The Union artillery opened fire and drove the Confederates from the crest of the hill. Jackson pushed additional troops to the west, but they were also stalled by enemy fire. Finally, Taylor's Brigade, in a classic charge, turned Banks' right flank and the Union line collapsed. At the same time, Ewell, who had attacked the left of the Union line, succeeded in turning Banks' left flank. The Union army fled north in complete disarray. A cavalry charge at this point might have succeeded in completely destroying the Union army. However, Ashby's command had not reformed after the previous day's looting and Ashby was nowhere to be found. Jackson attempted to pursue with his infantry, but

the exhausted troops were forced to give up a few miles north of Winchester (15:226-233; 8:245-250). One of Jackson's staff officers finally found Ewell's cavalry commander, Brig Gen Steuart, west of Winchester, but Steuart refused to obey Jackson's orders to move. Since Steuart was under Ewell's command, he would act only on Ewell's orders. When Ewell heard of this, he immediately ordered Steuart to pursue the retreating Union army but it was too late. Banks had time to reach the Potomac and cross safely during the night 7:404-405).

After a day's rest, Jackson resumed his advance beyond Winchester. On the 28th Brig Gen Winder moved the Stonewall Brigade to Harper's Ferry. After a brief skirmish with the Union defenders there, he camped about two miles to the southwest of the town. On the following day, Jackson joined him with the main army. At this point, Confederate offensive actions ceased as new problems faced Jackson (1:125-126).

CONFEDERATE RETREAT AND STRATEGIC VICTORY

When reports of Jackson's attack at Front Royal reached Washington, Lincoln acted immediately to trap Jackson in the lower valley. He suspended McDowell's advance on Richmond, which had been scheduled for the 26th, and ordered him to send two divisions to the Valley to capture Jackson's army (1:119). In addition, Lincoln ordered Fremont to abandon his planned offensive against Knoxville and to move his army to Harrisonburg to cutoff Jackson's retreat. Because of logistics problems, Fremont obtained permission to change his destination to Strasburg (18:187-190; 23:11). After Banks' rout at Winchester, Lincoln ordered McDowell to send a third division to the Valley. It should be noted that both McClellan and McDowell argued against the diversion of troops from Richmond (1:118-123; 15:234-246).

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By 30 June, Jackson's position was becoming precarious. As early as the 28th he had begun receiving reports of Union troop movements toward the Valley (15:263). By the 30th he knew that both Fremont and McDowell were approaching, and ordered the main army back to Winchester. Winder's brigade was directed to remain to collect outlying units and then follow as rapidly as possible. That same day, Shields' Division crossed the Blue Ridge and surprised the Confederate regiment at Front Royal. The Confederates fell back to Winchester in confusion, leaving Front Royal in Union hands. The Confederate army of 15,000 was now facing encirclement by 55-60,000 Union troops. The main Confederate body was in Winchester, 18 miles from Strasburg, while Winder was still near Harper's Ferry, 40 miles distant. Close behind Winder were 7000 Union troops at Harper's Ferry and another 7000 reforming under Banks on the north side of the Potomac. Shields held Front Royal, only 12 miles from Strasburg, with 10,000 men. An additional 20,000 under Ord and King were approaching Front Royal from the east. To the west, Fremont was 20 miles from Strasburg with 15,000 men (1:126-132). Jackson's only escape was to beat Shields and Fremont to Strasburg.

The Union commanders squandered their opportunity to trap Jackson on the 31st. Fremont had promised to occupy Strasburg by that evening, but camped several miles to the west. Shields spent the entire day consolidating his position in Front Royal while waiting for Ord's Division to arrive. Meanwhile, the Confederates hastened their evacuation of Winchester. Their supply train, extending for eight miles, hurried south followed by the army. By evening, the army had reach Strasburg where it camped while the trains continued south throughout the night. Winder, in a forced march, passed through Winchester and camped several miles to the south. Early on 1 June Ewell moved into position to block Fremont until Winder passed through

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Strasburg at midday. Ewell then withdrew and the Confederate column hastened up the Valley turnpike with Ashby covering the rear. Fremont and McDowell's cavalry finally closed the trap at Strasburg on the 2nd--behind Jackson (15:264-275; 1:126-135).

Having missed Jackson at Strasburg, McDowell sent Shields south through the Luray Valley in an attempt to flank or possibly block the Confederate withdrawal. Fremont and the cavalry pursued Jackson along the Valley Pike (18:196). Jackson anticipated Shields' advance in the Luray Valley and sent his cavalry to burn the bridges over the rain swollen Shenandoah River, isolating Shields on the east side of the river and preventing him from joining Fremont (1:127,137).

On the 5th, Jackson reached Harrisonburg and turned east toward Port Republic and Brown's Gap. This gave him a strong defensive position, the most direct access to the Virginia Central Railroad, and secure lines of communication with Richmond (7:427-428). He also controlled the only remaining bridge across the Shenandoah River which separated Fremont and Shields. Jackson was determined to keep Fremont and Shields from uniting. He left Ewell with 5000 men at Cross Keys, between Harrisonburg and Port Republic, to block Fremont's approach. The remainder of the army he positioned on the bluffs along the west bank of the Shenandoah River overlooking the route of Shields approach on the east side of the river. Jackson then moved the supply trains into Port Republic where he established his headquarters (1:139-146).

Fremont attacked Ewell at Cross Keys on the morning of the 8th. Fremont outnumbered Ewell two to one, but his attack was disorganized and listless. A charge by the Union left was easily repulsed by the Confederates. When no additional Union attacks materialized, the Confederate right charged and drove

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Fremont's left wing from the field. Fremont then withdrew his entire army (1:153-156).

This easy victory encouraged Jackson to try what now appears as an overly rash plan. He determined to attack both Shields and Fremont on the 9th. His plan was to leave a small force at Cross Keys to immobilize or delay Fremont while he shifted his main army across the river to attack Shields' advance force. He would then move the army back across the river and strike Fremont. The haste of this plan doomed it from the start. Commanders did not receive adequate instructions, men and artillery were unable to find their trains to replenish ammunition, and Port Republic became hopelessly congested, blocking troop movement.

On the morning of the 9th, Jackson began his attack. Brig Gen Tyler, commanding the Union advance, had selected a strong defensive position for his 3000 man contingent. The Union line was anchored on the left flank in the almost impenetrable forest of the Blue Ridge, while the right flank extended to the river. An artillery battery on the mountain flank commanded the entire field. Against this Jackson committed his forces piecemeal. Although he had 8000 men available for the attack, the congestion in Port Republic prevented his forces from coming rapidly onto the field. Jackson, in his haste to finish Tyler and turn on Fremont, did not wait to mass his troops. As a result, the initial Confederate attacks were repulsed with heavy losses. Jackson soon realized that he was in danger of defeat and that an attack on Fremont was out of the question. He ordered the force at Cross Keys to retreat to Port Republic and burn the bridge across the Shenandoah. After a protracted struggle, the Confederates were finally able to get sufficient troops into the battle to overwhelm the Union force. Tyler then retreated toward Shields' main body at Conrad's Store (15:295-308; 7:450-462).

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AFTERMATH

The battle of Port Republic marked the end of the Shenandoah Valley Campaign. Fremont received delayed orders on the 9th to halt at Harrisonburg. He obtained approval to fall back as far as Mount Jackson, and by the 20th was in Strasburg (10:62-65). Banks, who had re-entered Winchester, was ordered to Front Royal to secure the lower Valley in coordination with Fremont. McDowell and Shields were to return to Fredericksburg and resume the advance on Richmond, but Jackson was not quite finished (15:327). He sent his cavalry to harass the retiring Union armies. This action combined with the arrival of 8000 reinforcements from Richmond created Union fear of a new Confederate offensive in the Valley (10:65; 15:314). McDowell's move to Richmond was canceled. On 17 June, Jackson's Valley Army left the Valley for the last time to join Lee's army at Richmond. On 26 June, Lincoln combined Fremont's, Banks', and McDowell's commands into a single army under Maj Gen Pope. One of the missions of this new army was to "...attack and overcome the rebel forces under Jackson and Ewell..." --who were now gone (15:327).

Chapter Three

CAMPAIGN ANALYSIS

This chapter examines the Shenandoah Valley Campaign using the principles
of war as a framework for analysis. First, the twelve principles of war
defined by Air Force Manual 1-1 are presented. Each principle is then
followed by examples of effective and ineffective application by the Union and
Confederate commanders.

OBJECTIVE

The most basic principle for success in any military operation is a
clear and concise statement of a realistic objective. The objective
defines what the military action intends to accomplish and normally
describes the nature and scope of an operation. An objective may vary
from the overall objective of a broad military operation to the
detailed objective of a specific attack. The ultimate military
objective of war is to neutralize or destroy the enemy's armed forces
and his will to fight. However, the intimate bond which ties war to
politics cannot be ignored. War is a means to achieving a political
objective and must never be considered apart from the political end.
Consequently, political imperatives shape and define military
objectives. It follows that the objective of each military operation
must contribute to the overall political objective (21:2-4).

It is especially instructive to examine how well each side linked their
objectives in the Valley to the primary military objectives derived from their
grand strategy. Looking at the Valley in isolation, the Union won the Valley
Campaign. But when the contribution to the achievement of national objectives
is considered, the Confederacy was the clear winner.

Union

The Union high command lost sight of the primary objective of its forces in the Valley. By 1862, the Union grand strategy for defeating the Confederacy was focused on the capture of Richmond, the Confederate capital. To accomplish this, Gen McClellan had organized the largest army ever raised on the North American continent and was about to launch his Peninsula Campaign against Richmond. The objective of all Union forces in Virginia should have been to support this campaign. Initially, this was true for the Union forces in the Valley. When Banks crossed the Potomac, his instructions were to drive Jackson out of Winchester and post a small garrison to protect the canal and railway along the Potomac. He was then to move his army to Manassas Junction to protect Washington while McClellan moved his army to the peninsula (15:100-102). Jackson's attack at Kernstown changed this objective. Banks was ordered to drive Jackson out of the Valley and then assume a defensive posture to prevent his return (8:133). Because this expanded objective now kept Banks in the Valley, McDowell was detached from McClellan and positioned at Manassas Junction to protect Washington (15:128-131). Thus Banks' new objective in the Valley withheld resources from the Union offensive against Richmond. After Jackson defeated Banks at Winchester, Lincoln again stopped McDowell's army from joining McClellan and sent three divisions to the Valley to capture Jackson (1:118-123). The Union objective in the Valley was expanded to seek the defeat of Jackson, once more at the expense of the Richmond Campaign. Thus we see that while the Union had clear objectives in the Valley, they were counterproductive in terms of the key objective of the national military strategy.

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Confederacy

Confederate objectives within the Valley remained linked to their national objective, which was recognition as an independent nation. Confederate grand strategy was to make the war so costly that the Union would quit, and to gain foreign recognition and aid. The loss of the Confederate capital would undermine both of these strategies. Therefore, in the summer of 1862, the overriding military objective of the Confederacy was the to save Richmond. Jackson's objectives in the Valley were established to support this defense. His instructions at the beginning of the Valley Campaign were to keep Banks in the Valley and to keep his own army ready to go to the defense of Richmond (1:38). These instructions remained unchanged throughout the campaign. All of Jackson's actions in the Valley were directed toward the goal of relieving Union pressure on Richmond. Correspondence with the Confederate high command constantly made this objective clear. As a result, Jackson's objectives throughout the campaign supported the Confederate national objectives.

OFFENSIVE

Unless offensive action is initiated, military victory is seldom possible. The principle of offensive is to act rather than react. The offensive enables commanders to select priorities of attack, as well as the time, place, and weaponry necessary to achieve objectives (21:2-5).

Union

The Union commanders in the Shenandoah Valley showed a notable lack of offensive spirit. In part, this may have been due to the pressure to transfer troops to McDowell for the Richmond offensive. However, their unwillingness to take offensive action when they had the advantage enabled Jackson to continue to disrupt Union plans. For instance, during the initial advance into the Valley, Banks outnumbered Jackson 30,000 to 4600 (1:40; 8:114). Yet

as soon as Jackson retreated from Winchester, the Union pursuit ceased. Following Kernstown, Banks' pursued Jackson with superior forces, and again withdrew without attempting to defeat him. At Port Republic, the combined Union forces outnumbered the Confederates 25,000 to 13,000 (1:127,146). Jackson defeated only the two lead brigades of Shields' army, but the Union armies withdrew and left Jackson free to join Lee.

Confederacy

One of Jackson' predominating characteristics was his aggressiveness. Throughout the campaign he sought the opportunity to attack. Often he would attack at the end of a long day's march so he wouldn't lose the advantage. He struck Shields at Kernstown as soon as Williams' Division left the Valley. After his defeat at Kernstown, Jackson took only six weeks to reorganize his army and train new recruits before launching his attack at McDowell (3:482-490). He then immediately struck Front Royal and Winchester and retreated back up the Valley only in the face of overwhelming Union forces. At Port Republic, even though he was outnumbered two to one, he attempted a double attack against two Union armies on the same day. Of the six battles Jackson fought during the Valley Campaign, he initiated five and chose the location of the sixth. Throughout the campaign he used offense to force the Federal armies to react rather than act.

SURPRISE

Surprise is the attack of an enemy at a time, place, and manner for which the enemy is neither prepared nor expecting an attack. The principle of surprise is achieved when an enemy is unable to react effectively to an attack. Surprise is achieved through security, deception, audacity, originality, and timely execution. Surprise can decisively shift the balance of power. Surprise gives attacking forces the advantage of seizing the initiative while forcing the enemy to react. When other factors influencing the conduct of war are unfavorable, surprise may be the key element in achieving the objective (21:2-5).

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Union

Shields was the only Union commander to successfully achieve surprise. He accomplished this twice, but squandered his advantage both times (18:192). Kernstown is the best example. When Shields pulled his army back to Kernstown, he carefully hid the bulk of his army from the Confederate cavalry. The simultaneous withdrawal of Williams' Division fooled the Confederates into thinking that only 2000 Union troops remained. Jackson attacked and, once engaged, discovered that his 3000 men were opposed by Shields' entire division of 9000. If Shields had pressed his advantage, he might have been able to destroy Jackson's army (8:128; 16:51). Shields also surprised the Confederates in Front Royal on his return to the Valley after the battle of Winchester. He routed the town's defenders, but then failed to continue on to Strasburg and cut off Jackson's retreat.

Confederacy

The Confederates also achieved surprise at Front Royal through superior maneuver. Banks lost track of Jackson after the battle of McDowell. When Jackson launched his attack on Front Royal, Banks thought Jackson was still to the south near Harrisonburg (15:206). The Confederate surprise attack completely routed the garrison at Front Royal. This placed Jackson in Banks' rear. For a day Banks thought the attack was only a cavalry raid and that Jackson was still to the south (8:192). Only Jackson's failure to intercept Banks during his retreat to Winchester prevented total destruction of the Union army.

SECURITY

Security protects friendly military operations from enemy activities which could hamper or defeat...forces. Security is taking continuous,

positive measures to prevent surprise and preserve freedom of action.
Security involves active and passive defensive measures and the denial
of useful information to an enemy. To deny an enemy knowledge of
friendly capabilities and actions requires a concerted effort in both
peace and war. Security protects friendly forces from an effective
enemy attack through defensive operations and by masking the location,
strength, and intentions of friendly forces (21:2-5).

Union

Overall, Union efforts at security were poor. The one exception was
Shields' successful ruse at Kernstown. He kept his main body well hidden
outside the town. When the Confederate cavalry attacked his pickets, he
resisted with only a single brigade, thus fooling the Confederates into
believing only a small force remained. Based on this faulty information,
Jackson attacked immediately and was defeated (20:235; 1:44). On the whole,
the Confederate cavalry and Southern sympathizers were able to keep Jackson
well informed of Union movements. Brig Gen Taylor, one of Jackson's brigade
commanders, describes how Jackson was met on the approach to Front Royal by a
young lady from the town who described the Union position in detail. Yet
Taylor had the feeling that Jackson already knew the enemy disposition before
he left Harrisonburg (16:54). Perhaps the greatest Union security failure
occurred in conjunction with the movement of troops to trap Jackson following
Banks' defeat at Winchester. Lincoln issued orders on 24 May for Fremont and
McDowell to sent reinforcements to the Valley. By the 28th, Jackson knew of
the approach of McDowell, and he knew of Fremont's approach the following day
(15:263; 6:Map 52). If the Union had been able to keep these movements secret
for one more day, the Valley campaign might have ended quite differently.

Confederacy

Jackson placed great emphasis on preserving the secrecy of his operations.
His success in this was primarily due to two factors. First, Jackson seldom

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disclosed his plans, even to his subordinate commanders. And second, the Confederate cavalry did an excellent job of screening the army and closing the Valley to Union reconnaissance. The McDowell operation was a good illustration.

Jackson took special precautions to ensure the secrecy of his move toward McDowell, with limited success. He told only one or two of his staff of his destination (14:67). When Ewell arrived in Jackson's abandoned camp at Conrad's Store on the 30th, he had only a vague idea of Jackson's whereabouts (7:346,350). Jackson sent his cavalry to demonstrate in front of Banks, while the Confederate army took an indirect route out of the Valley, only to return to Staunton by rail. Upon his arrival, Jackson blocked the roads out of town to prevent word of his location from reaching Banks. Despite these precautions, Banks had learned of Ewell's arrival at Conrad's Store and the direction of Jackson's march by 2 May (17:226-228). However, Gen Milroy, the Union commander in McDowell did not learn of Jackson's advance until the 7th, the day before the battle (1:72). After the battle of McDowell, Banks lost contact with Jackson's army. Strong Confederate cavalry demonstrations convinced him that the Confederate army was near Harrisonburg, and he did not learn otherwise until Jackson took Front Royal (8:184).

MASS

Success in achieving objectives...requires a proper balance between the principles of mass and economy of force. Concentrated fire power can overwhelm enemy defenses and secure an objective at the right time and place. The impact of...[mass]...can break the enemy's defenses, disrupt his plan of attack, destroy the cohesion of his forces, produce the psychological shock that may thwart a critical enemy thrust, or create an opportunity for friendly forces to seize the offensive (21:2-6).

Union

One of the causes of the Union failure against Jackson was their failure to mass forces at the critical times. The Union had sufficient forces within one or two days march of each battle to outnumber the Confederates by at least two to one. Yet Jackson achieved numerical superiority in every battle except Kernstown and Cross Keys (15:323). The most significant Union failure occurred as Jackson retreated from Winchester in May. Thirty-five thousand Union troops could have been in position at Strasburg to block his retreat. Two days before Jackson passed through Strasburg, Fremont was one day to the west and Shields was one-half day to the east (1:127,132). Even so, the Federal forces failed to unite ahead of Jackson. Port Republic provides a second example. Shields' force was so strung out that he was unable to support his lead brigades, commanded by Brig Gen Tyler, when Jackson attacked them. Fremont did not go to Shields' aid, even though he was only five miles from Port Republic and was opposed by only a small blocking force which withdrew during the battle.

Confederate

Jackson had mixed success in applying the principle of mass. His march to join his army with that of Johnson, defeat the Union force pinning Johnson in place, and then join Ewell was an outstanding demonstration of how maneuver and speed can achieve superior mass. This consolidation of the Confederate armies in the Valley enabled him to defeat Banks at Front Royal and Winchester. At Port Republic, however, he demonstrated an equally classic example of failure to apply mass. Jackson was so anxious to defeat Tyler and turn on Fremont that he committed his forces piecemeal before he could achieve superior numbers on the battlefield. As a result, the Union army could

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concentrate its firepower on one Confederate unit at a time and drive it back. It was only after heavy losses that Jackson achieved numerical superiority and drove the Union forces from the field (15:307-308).

ECONOMY OF FORCE

> ...using economy of force permits a commander to execute attacks with appropriate mass at the critical time and place without wasting resources on secondary objectives. War will always involve the determination of priorities. The difficulty in determining these priorities is directly proportional to the capabilities and actions of the enemy and the combat environment. Commanders at all levels must determine and continually refine priorities among competing demands for limited...assets. This requires a balance between mass and economy of force, but the paramount consideration for commanders must always be the objective (21:2-6).

Union

The Union was extremely ineffective in achieving economy of force. The ultimate example is McDowell's Corps. This 40,000 man army was never able to participate as a unit in the Peninsula Campaign. It remained caught between preparations to move to Richmond and emergency deployments to the Valley. Lincoln's preoccupation with Jackson kept this force from the Union offensive designed to end the war. A second example is the utilization of Fremont's army. This force was kept in the Allegheny Mountains where it could not be adequately supplied and could contribute little to the Richmond offensive or the Valley Campaign. If this army had been moved east, it may have shifted the balance of forces in the Valley and enabled McDowell to join the attack on Richmond. A final example is the way in which the Union used their forces once they reached the Valley. When Jackson escaped from the Union pincer movement at Strasburg, Fremont and Shields, with a combined strength of 25,000, followed Jackson's army of 13,000 to Port Republic. After the minor battle of Cross Keys and the battle of Port Republic, in which only Shields' two advance brigades were defeated, both Union armies withdrew

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(15:295-308,311). The Union had achieved nothing with these 25,000 men in the Valley, while in the east, the fate of Richmond hung in the balance.

Confederate

The effectiveness of the Confederates in employing economy of force can be seen by examining the number of Union forces arrayed against Jackson. During the Confederate retreat from Winchester in May, 55-60,000 Union troops were tied up by Jackson's army of 15,000. These included 30,000 under McDowell, 15,000 under Fremont, and 7000 under Banks (1:127). Ultimately, McDowell was able to send only one division of 10,000 men to McClellan at Richmond (6:Map 53). Thus, Jackson's army was able to make a greater contribution to the defense of Richmond through its actions in the Valley than it could have with Johnston's army at Richmond.

MANEUVER

War is a complex interaction of moves and counter moves. Maneuver is the movement of friendly forces in relation to enemy forces. Commanders seek to maneuver their strength selectively against an enemy's weakness while avoiding engagements with forces of superior strength. Effective use of maneuver can maintain the initiative, dictate the terms of engagement, retain security, and position forces at the right time and place to execute surprise attacks. Maneuver permits rapid massing of combat power and effective disengagement of forces. While maneuver is essential, it is not without risk. Moving large forces may lead to loss of cohesion and control (21:2-6).

Union

The Federal commanders were ineffective in the use of maneuver. There was a great deal of Union troop movement up and down the Valley, and between the Valley and Manassas Junction. However, this movement was mostly in reaction to Confederate actions and did not gain significant advantage for the Union. The one exception is again provided by Shields. As previously mentioned, he used his withdrawal from Strasburg to Kernstown to hide his true strength.

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Through maneuver, he was also able to select the battlefield and induce Jackson to attack (8:128; 20:235). The Federal failure to gain the initiative is all the more telling because because of their overwhelming numerical advantage.

Confederacy

Jackson used maneuver as one of his principle means of overcoming Union numerical superiority. When challenged on the difficulty of his marches, he stated that "it was better to lose one man in marching than five in fighting" (16:91). Such was the speed and range of his infantry that it became known as Jackson's "foot cavalry." From the time his army left Conrad's Store on 30 April until the battle of Port Republic on 9 June, it marched nearly 400 miles (15:319). This was not aimless marching. In the face of Banks' superior force, Jackson was able to cross the Valley and join Johnson. Their combined armies then defeated Fremont, thereby preventing Banks and Fremont from uniting. Jackson then recrossed the Valley, added Ewell's force to his own growing army, and attacked Banks at Front Royal. Following the battle of Winchester, Jackson again used his superior ability to maneuver to escape the Union pincer movement at Strasburg and gain safety at Port Republic. This exceptional mobility was gained at a price, however. Straggling was a constant problem in Jackson's army. During the retreat from Winchester in June, he lost several times more men to straggling than he lost in battle on the way north (15:277).

TIMING AND TEMPO

Timing and tempo is the principle of executing military operations at a point in time and at a rate which optimizes the use of friendly forces and which inhibits or denies the effectiveness of enemy forces. The purpose is to dominate the action, to remain unpredictable, and to

create uncertainty in the mind of the enemy. Commanders seek to
influence the timing and tempo of military actions by seizing the
initiative and operating beyond the enemy's ability to react
effectively. Controlling the action may require a mix of surprise,
security , mass, and maneuver to take advantage of emerging and
fleeting opportunities. Consequently, attacks against an enemy must
be executed at a time, frequency, and intensity that will do the most
to achieve objectives. Timing and tempo require that commanders have
an intelligence structure that can identify opportunities and a
command, control, and communications network that can responsively
direct combat power to take advantage of those opportunities (21:2-6).

Union

Just as the Union commanders failed to effectively use maneuver, they also

failed to take advantage of timing and tempo. During the initial Union

advance, Banks first encountered Confederate pickets north of Winchester on 7

March, but did not take Winchester until the 12th (15:106, 110). He did not

pursue Jackson south of the city for two more days (6:Map 49). This delay

enabled Jackson to complete an orderly retreat from the city. After the

battle of Kernstown, the slowness of the Union pursuit again allowed Jackson's

army to reach safety (16:51). Even when Union forces nearly surrounded

Jackson's army following the battle of Winchester, they did not seize the

initiative. The Union failure to effectively employ timing and tempo to their

advantage is best illustrated by looking at the six battles fought during the

campaign. Only at Cross Keys did the Union army initiate the attack. And

even there, Fremont let Ewell dictate the course of the fighting after the

first Union charge was repulsed (1:153-156).

Confederacy

Jackson completely controlled the tempo of the Valley Campaign. He used

maneuver and offensive action to seize the initiative from the Union forces.

This was a major factor in his ability to neutralize the Union numerical

advantage. From the initial Union advance, intended to stop his attacks along

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the Potomac on the Chesapeake and Ohio Canal and the Baltimore and Ohio Railroad, Union actions were a reaction to Jackson's activities. Both his attack at Kernstown and his attack at Front Royal caused divisions which had just been transferred from the Valley to be hastily returned. In each instance, McDowell's move to Richmond was also suspended. Following the battle of Port Republic, the arrival of Confederate reinforcements in there Valley and renewed action by Jackson's cavalry were sufficient to cause Lincoln to cancel McDowell's advance permanently (10:65; 15:314). Thus, Jackson's control of the timing and tempo of the campaign not only dictated Federal movements within the Valley, but also prevented effective engagement of a 40,000 man Union army located outside of the Valley.

UNITY OF COMMAND

Unity of command is the principle of vesting appropriate authority and responsibility in a single commander to effect unity of effort ir carrying out an assigned task. Unity of command provides for the effective exercise of leadership and power of decision over assigned forces for the purpose of achieving a common objective. Unity of command obtains unity of effort by the coordinated action of all forces toward a common goal. While coordination may be attained by cooperation, it is best achieved by giving a single commander full authority (21:2-6).

Union

The Union had serious command problems during the Valley Campaign. In March, Lincoln relieved McClellan from supreme command of the army so that he could concentrate on the Peninsula Campaign. Instead of appointing a replacement for McClellan, Lincoln left McClellan, Fremont, Banks, and McDowell reporting directly to the Secretary of War (10:48-49; 11:225). Thus, coordination of the war effort in Virginia had to be done by the President and Secretary of War. This resulted in poor utilization of forces early in the campaign, but became critical after the battle of Winchester. The failure of

the Union pincer movement against Jackson, despite other contributing causes, was a direct result of the absence of a single on-scene commander who could coordinate and direct the movement. This failure led Lincoln to unify the commands of Fremont, Banks, and McDowell under Maj Gen Pope at the end of the Valley Campaign (6:Map 54).

Confederacy

On paper, the Confederacy did not have a command problem in the Valley. Ewell and Johnson became subordinate to Jackson when he incorporated their armies into his own, and Jackson reported in turn to Gen Johnston. Two command problems did arise, however. As Johnston became increasingly preoccupied with the defense of Richmond, Gen Lee began encouraging action to delay McDowell's advance. Although Lee was military advisor to President Davis, he had no direct authority over Jackson. Lee's inclination to offensive action appealed to Jackson and he took a liberal interpretation of Johnston's defensive instructions. Johnston's attention returned to the Valley just as Jackson and Ewell were planning the attack on Front Royal. He ordered Jackson to take a defensive position at Conrad's Store and Ewell to move to Richmond. Fortunately, Jackson was able to convince Johnston of the advantages of an attack on Banks, and Johnston canceled his orders (7:357-369; 15:185-202). The other command problem occurred after the battle of Winchester. Ewell's cavalry commander, Brig Gen Steuart, refused an order from Jackson to pursue Banks, contending that the order had to come from Ewell. By the time Ewell was able to confirm the order, the opportunity to catch Banks was lost (1:115).

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SIMPLICITY

To achieve a unity of effort toward a common goal, guidance must be quick, clear, and concise-it must have simplicity. Simplicity promotes understanding, reduces confusion, and permits ease of execution in the intense and uncertain environment of combat. Simplicity adds to the cohesion of a force by providing unambiguous guidance that fosters a clear understanding of expected actions. Simplicity is an important ingredient in achieving victory, and it must pervade all levels of a military operation (21:2-7).

Union

Union operations throughout the campaign conformed to the principle of simplicity. Movements were straight forward, and there are no examples of misunderstood orders causing significant problems. It is true that when Fremont decided to move into the Valley at Strasburg, rather than at Harrisonburg as originally directed, he changed a simple blocking movement into a more complicated pincer movement. However, the poor condition of his troops left him little other choice. In the final analysis, it was not complexity that caused the pincer movement to fail. It was the lack of unity of command and a lack of offense by Banks and Fremont that caused the failure.

Confederacy

Likewise, Confederate activities also conformed, for the most part, to the principle of simplicity. The movements of Jackson's army were often devious, but not complicated. Jackson's orders to his subordinates were noted for their brevity. However, Jackson departed from simplicity in planning his attack on Shields and Fremont at Port Republic. Plans for the attack were not finalized until the night before the attack. Jackson planned to move his army over two rivers and through the town, attack and defeat Shields by mid-morning, and then recross the rivers and attack Fremont. He did not account for the difficulty of the river crossings, the congestion within the town, the difficulty of locating unit supply trains, or the time required to

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get the plans of the attack to the unit commanders. The result was that the

attack against Fremont had to be canceled, and the attack against Shields was

successful only after heavy casualties (15:295-308).

LOGISTICS

Logistics is the principle of sustaining both man and machine in
combat.   Logistics is the principle of obtaining, moving,   and
maintaining warfighting potential.   Success in warfare depends on
getting sufficient men and machines in the right position at the right
time.   This requires a simple, secure, and flexible logistics system
to be an integral part of an...operation. Regardless of the scope and
nature of a military operation, logistics is one principle that must
always be given attention. Logistics can limit the extent of an
operation or permit the attainment of objectives (21:2-7).

Union

Union logistics support of its armies was mixed.   The forces in the Valley

seem to have been well supported.   Both Winchester and Strasburg were

connected to Washington by rail, and Jackson captured a large amount of

supplies after his attack on Winchester.   Despite the Confederates' best

efforts, they could not transport all of these to the south and had to burn a

large quantity of stores when Winchester was abandoned (7:411,416).   Fremont's

army in the Alleghenies was not so fortunate.   He had very limited wagon

transport and the roads were in terrible shape (10:53).   The main reason that

he could not move to Harrisonburg in response to Lincoln's orders was his

inability to extend his supply lines. A special investigator sent by Lincoln

reported that "The army was in a starving condition, and literally unable to

fight..." (12:637).   Army movements in the Valley were also hindered by their

logistics "tail". Following Kernstown, Banks halted his pursuit of Jackson

for several days to "bring up supplies" (10:50-51).

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Confederacy

Confederate forces were also adequately supplied, although their needs were more spartan than those of the Union. The great grainery of the Shenandoah provided for their needs. In addition, the captured Union stores provided welcome variety and much needed medicines and munitions. Jackson recognized the impact of logistics on mobility. Following Kernstown, he reduced his supply train considerably. Tents and mess chests were abandoned and the men had to carry their knapsacks and blankets instead of placing them in the wagons (2:73). Ewell noted that "...the road to glory cannot be followed with much baggage" (17:236). These improvements provided the mobility which was to prove so important later in the campaign.

COHESION

Cohesion is the principle of establishing and maintaining the warfighting spirit and capability of a force to win. Cohesion is the cement that holds a unit together through the trials of combat and is critical to the fighting effectiveness of a force. Throughout military experience, cohesive forces have have generally achieved victory, while disjointed efforts have usually met defeat. Cohesion depends directly on the spirit a leader inspires in his people, the shared experiences of a force in training or combat, and the sustained operational capability of a force. Cohesion in a force is produced over time through effective leadership at all levels of command (21:2-8).

Union

The campaign showed no great extremes in the cohesion of the Union troops. However, there are some examples of the effect of cohesion on fighting spirit. At McDowell, the troops of Milroy and Schenck fought extremely well, despite being outnumbered. The troops under Tyler at Port Republic also fought extremely well. They counterattacked and refused to be driven from the field until overwhelmed by superior numbers. On the other hand, Fremont chose his German immigrants under Blenker for his attack at Cross Keys. These troops

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could speak little English and did not really understand the war. Their attack was listless and soon repelled (15:293). It is interesting to note that the troops of Milroy and Schenck reached the battle of Cross Keys late, but began to engage the Confederates without orders until they were called back by Fremont as he withdrew from the battle (14:88).

Confederacy

The men of the Jackson's army came to form a special bond. Despite Jackson's harsh discipline and the punishing conditions to which they were exposed on the march, they loved him. Success and shared dangers brought a sense that they were something special. They were Jackson's "foot cavalry," and they believed themselves invincible (15:319). Douglas, a member of Jackson's staff observed "This caused the mutual confidence between himself and his troops which was so marvelous. They believed he could do anything he wished, and he believed they could do anything he commanded" (4:235).

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APPENDICES

Appendix A

CHRONOLOGY OF KEY EVENTS

Date	Event
4 Nov 1861	Jackson assumes command of the Valley District
24 Feb 1862	Banks crosses the Potomac and occupies Harper's Ferry
12 Mar 1862	Banks occupies Winchester
17 Mar 1862	McClellan's troops embark to begin the Peninsula Campaign
23 Mar 1862	Battle of Kernstown
3 Apr 1862	Lincoln suspends McDowell's move to join McClellan
30 Apr 1862	Jackson leaves Conrad's Store to begin McDowell operation
8 May 1862	Battle of McDowell
23 May 1862	Battle of Front Royal
24 May 1862	Lincoln orders Fremont and McDowell to move to the Valley
25 May 1862	Battle of Winchester
30 May 1862	Jackson begins retreat from Harper's Ferry
1 Jun 1862	Jackson escapes pincer movement at Strasburg
8 Jun 1862	Battle of Cross Keys
9 Jun 1862	Battle of Port Republic
17 Jun 1862	Jackson leaves the Valley to join Lee at Richmond

Appendix B

GUIDED DISCUSSION QUESTIONS

1. Lead-Off Question

How did the initial objectives of Jackson and the Union commanders in the Shenandoah Valley relate to each nation's national objectives?

Discussion

In 1862 the Northern national objective was to defeat the Confederacy and restore the Union. One of the military strategies supporting this objective was the capture of Richmond, the Confederate capital. To achieve this end, Gen McClellan had organized the largest army in the nation's history. By the spring of 1862, the capture of Richmond was the keystone of the Union military strategy. Banks' objective in the Valley was to push Jackson out of Winchester in order to secure the Baltimore and Ohio Railroad and the Chesapeake and Ohio Canal. He was then to leave a small garrison in the lower Valley and move his army to Manassas Junction to protect Washington while McClellan's army advanced on Richmond.

The Confederate national objective was to secure recognition as an independent nation. A dual military and political strategy was adopted to

accomplish this objective. On the political front, the Confederacy sought
international recognition and aid. Militarily, the Confederate strategy was
to fight a defensive war while seeking to make the war too costly for the
Union to continue. Neither of these aims would be served by the fall of
Richmond. Thus the Southern focus was on the defense of Richmond. Jackson's
initial objective was to prevent the Union forces in the Valley from joining
any offensive against Richmond while keeping his army ready to move
immediately to the defense of Richmond.

a. Follow-Up Question

What changes occurred in Confederate and Union objectives in the
Valley as the campaign progressed, and how did these relate to each nation's
national objective?

Discussion

As the Valley Campaign progressed, the Union objective in the Valley
increasingly turned toward Jackson's defeat. This trend culminated, following
Jackson's victory over Banks at Winchester, when Lincoln sent McDowell to the
Valley with instructions to capture Jackson. During this time the Northern
national objective and supporting military strategy did not change. As a
result, an increasingly large number of troops were diverted from the
offensive against Richmond, the central element of the Union's overall
military strategy, to a sideshow war in the Valley.

The Confederate objective in the Valley remained unchanged. However, Jackson became more aggressive in his actions designed to hold the Union forces in the Valley.

2. Lead-Off Question

Why were the Union forces unable to end the threat from Jackson's army, even though they had overwhelming numerical superiority?

Discussion

The Union never made an attempt to defeat Jackson's army. Each time a numerically superior Union force advanced on Jackson, he retreated. The Union army would then withdraw. This failure by the Union to engage Jackson's army was probably due to their desire to transfer their forces from the Valley to McDowell's army as rapidly as possible. Other factors which may have contributed to the Union failure to engage Jackson include a lack of offensive orientation, the lack of unity of command in the Valley, and the superior mobility of the Confederate army.

a. Follow-Up Question

Should the Union have tried to engage and defeat Jackson in the Valley in order to end his disruption of the Peninsula Campaign?

Discussion

There is no textbook answer to this question. However, consider
Jackson's mobility and the ease with which he could get information about
Union troop movements. Also consider the principles of war, particularly
objective, economy of force, and logistics. Any attempt to engage Jackson
with superior forces would have been difficult, and would probably have
diverted even more troops from the Richmond Campaign. If Jackson became too
hard pressed, he could always slip through one of the gaps in the Blue Ridge
and join Johnston in Richmond.

b. Follow-Up Question

What action should the Union have taken to counter Jackson's army in
the Valley?

Discussion

Again, there is no textbook answer. Brainstorm some ideas and look
at them in light of the principles of war and the impact on the Richmond
offensive. The purpose of your discussion is to practice using the principles
of war to evaluate the effectiveness of alternate actions and to see how the
principles are interrelated and sometimes contradictory.

3. Lead-Off Question

The Valley Campaign was a minor series of engagements when compared to battles

such as Shiloh, the Peninsula Campaign, or later battles in the war. This being so, what is the significance of the campaign?

Discussion

The Valley Campaign is significant in two ways. The first is in its contribution to the Confederate war effort. The second is in its value to us today as an example of how superior leadership and strategy can overcome numerical and material superiority on the battlefield.

The Valley Campaign had a major impact on McClellan's Peninsula Campaign. In fact, there are those who view it as a part of the Peninsula Campaign. Jackson's aggressive action against the Union forces in the Valley disrupted the planned transfer of Union troops for the Peninsula Campaign. By forcing Banks to remain in the Valley, Jackson caused Lincoln to detach one wing of McClellan's army, McDowell's Corps, and hold it near Washington. Each time McDowell was ready join McClellan, a victory by Jackson in the Valley caused Lincoln to suspend McDowell's march. In June, Jackson's victory at Port Republic resulted in the permanent cancellation of McDowell's advance to Richmond. Without McDowell's troops, McClellan's offensive against Richmond eventually failed. The Confederacy was given the time it needed to organize its war effort and was able to survive for three more years.

Today, the Valley Campaign stands as a classic case study in leadership, strategy and the effective application of the principles of war. A careful study of the campaign yields many lessons. Some of these, relating to the principles of war, have been discussed in this paper. However, there are many other lessons dealing with such issues as leadership style, discipline, command relationships, and the use of combined arms. Care must be taken not

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to look only to Jackson and the Confederates. There is at least as much to be learned on the Union side. The glamour attached to Jackson has caused Union accomplishments to be downplayed in many accounts. But their many successes, as well as their failures, contain significant lessons. All military professionals have much to learn from a careful study of the Valley Campaign.